



**Karen Kelly, CFP<sup>®</sup>**  
FINANCIAL ADVISOR

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With an emphasis on making complicated strategies understandable, Karen helps empower her clients to make confident decisions.

Karen understands the needs of families and small business owners, having run her own company and consulting practice for the last 18 years. Prior to that, she helped launch Sail America – the sailing industry’s first national trade association. She led the multi-million dollar association for many years as its Executive Director.

She graduated from Boston College with a BS degree in Business Management and a concentration in Accounting. She holds the CERTIFIED FINANCIAL PLANNER™ designation and is an active volunteer at Rosie’s Place and the Alzheimer’s Association.

Karen lives in Boxborough with her husband and enjoys traveling with her family, playing tennis, hiking with the family dog (Jake) and watching her two kids play college sports.

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